

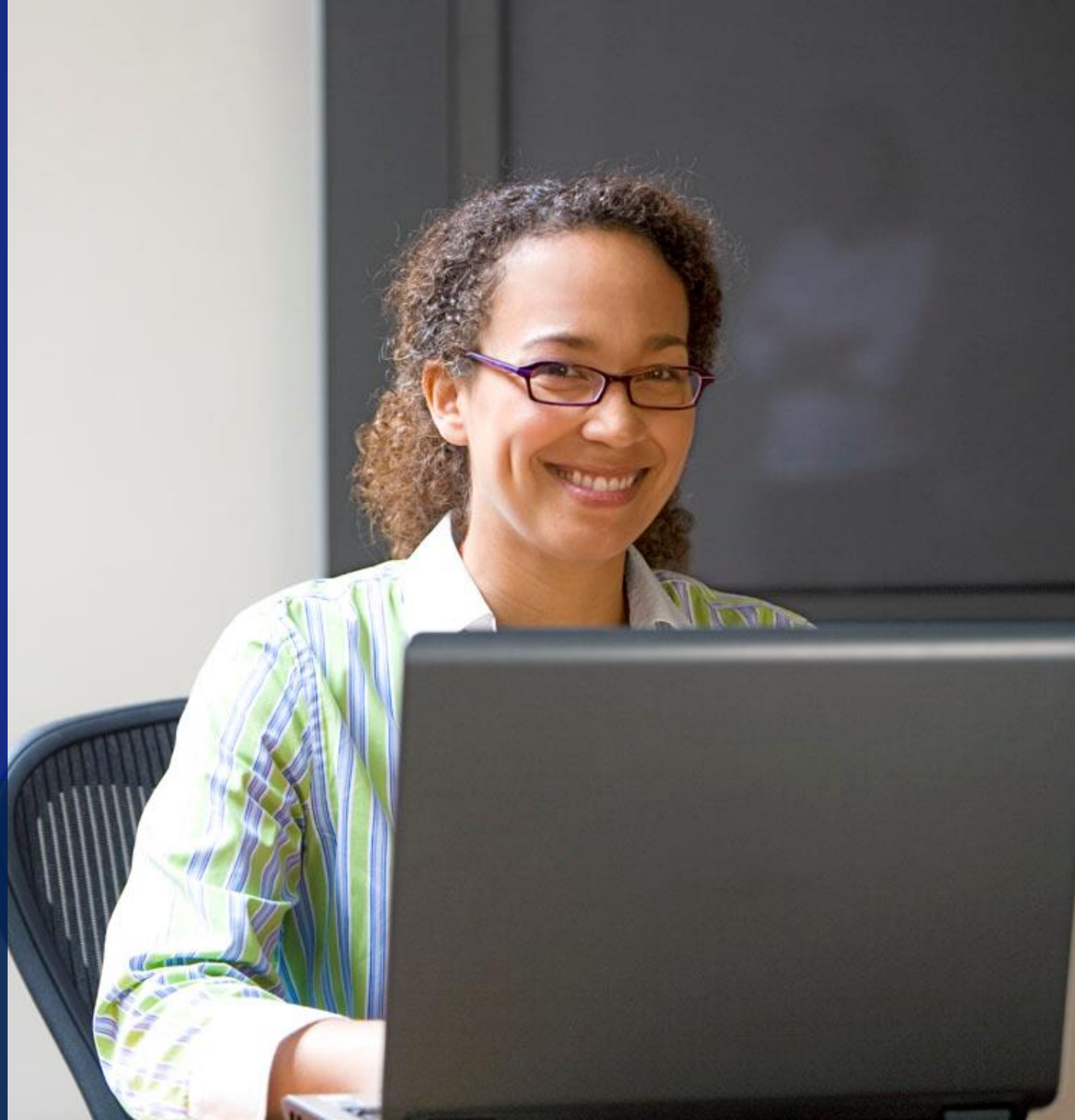
Start working in CRM

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2013 or 2015 (on-premises)

Get up and running quickly
with common tasks

Microsoft Dynamics



welcome to Microsoft Dynamics CRM!

Ready to get going with CRM?

You're in the right place.

In this eBook, you'll learn how to:

- Get around CRM and find what you need
- Enter data quickly and easily
- Work with contacts, accounts, leads, and opportunities
- Place calls, send email, and take notes
- Check the current status of service cases for a customer

Soon you'll be using Microsoft Dynamics CRM to keep track of your sales and win more business.



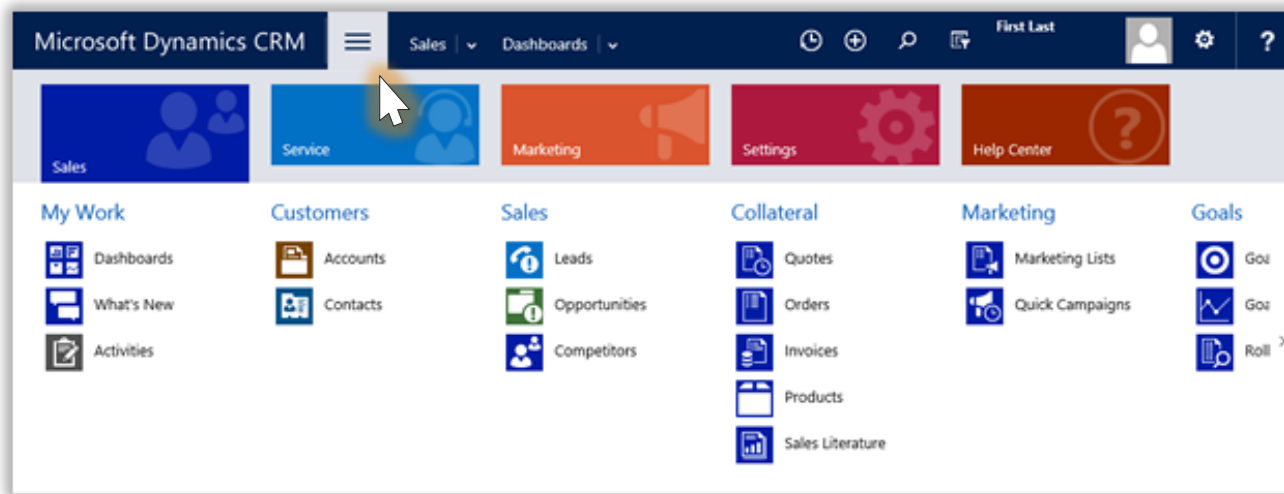
New to CRM? You may also want to [check out our CRM Basics eBook](#). It covers all the same essentials you'll find here, with a bit more detail. (Don't worry. It's still pretty short.)



get around and find your data

If your screen looks like this (latest version):

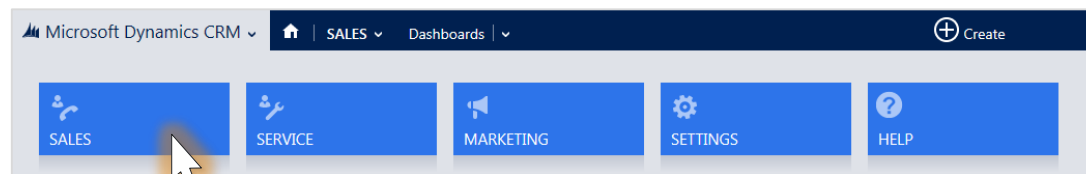
When you choose the Main Menu from the nav bar, you can access your work areas, records, or other items.



 [Take a video tour](#)

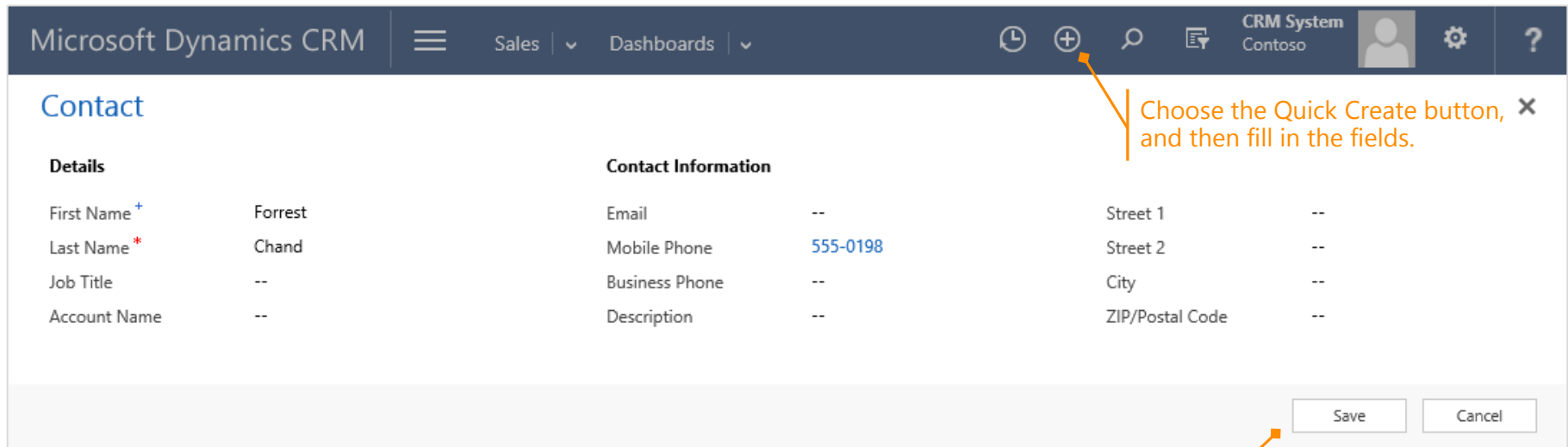
If your screen looks like this (older version):

On the nav bar, choose the **Microsoft Dynamics CRM** logo, and then choose the tile for your work area. You'll see the tiles for the different types of data and other items available.



enter contacts or other types of records

On the nav bar, choose the **Quick Create** button, and then enter data for a few fields. You can come back and fill in the gaps later when you have more time. Then, choose **Save**. An asterisk (*) indicates a required field.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes the Microsoft Dynamics CRM logo, a menu icon, and navigation options for 'Sales' and 'Dashboards'. On the right side of the navigation bar, there is a 'Quick Create' button (a plus sign in a circle), a search icon, a print icon, and a user profile for 'CRM System Contoso'. An orange arrow points from the 'Quick Create' button to a text box that says 'Choose the Quick Create button, and then fill in the fields.' Below the navigation bar, the 'Contact' form is displayed. It has two main sections: 'Details' and 'Contact Information'. The 'Details' section includes fields for 'First Name' (Forrest), 'Last Name' (Chand, marked with a red asterisk), 'Job Title' (empty), and 'Account Name' (empty). The 'Contact Information' section includes fields for 'Email' (empty), 'Mobile Phone' (555-0198), 'Business Phone' (empty), and 'Description' (empty). At the bottom right of the form, there are 'Save' and 'Cancel' buttons. An orange arrow points from the 'Save' button to a text box that says 'Choose Save when you're finished entering data.'

Details		Contact Information			
First Name +	Forrest	Email	--	Street 1	--
Last Name *	Chand	Mobile Phone	555-0198	Street 2	--
Job Title	--	Business Phone	--	City	--
Account Name	--	Description	--	ZIP/Postal Code	--

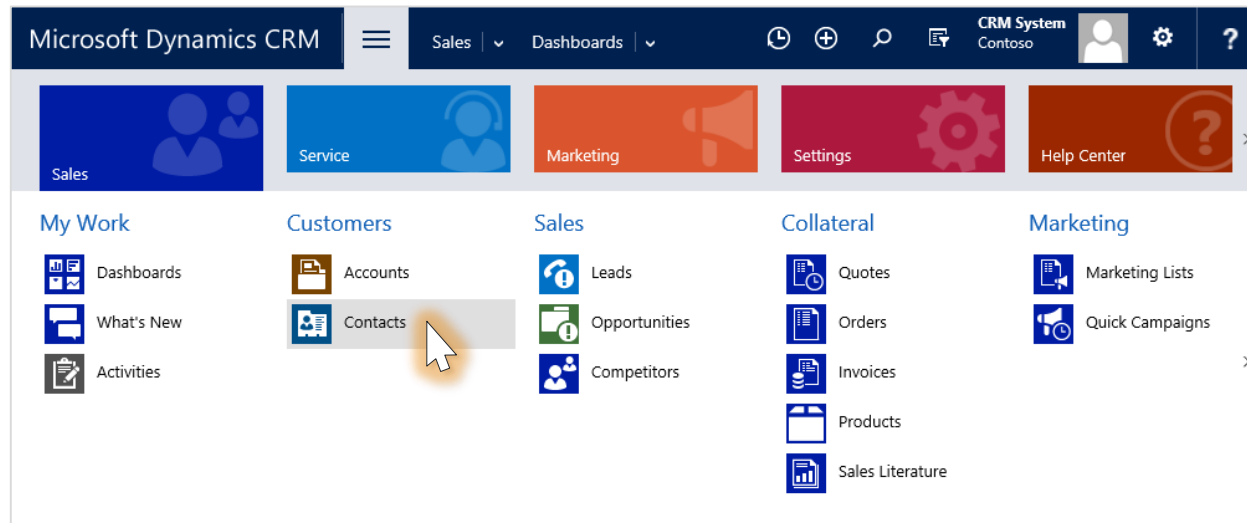
Choose **Save** when you're finished entering data.



find your contacts

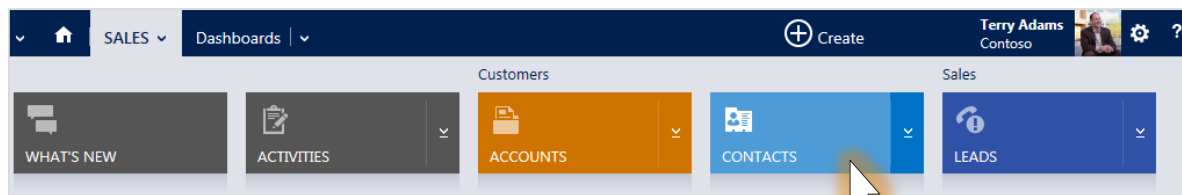
Similar to Microsoft Office Outlook or other email programs, you store data about the people you know and work with as contacts.

If your screen looks like this (latest version):
Go to **Sales, Service, or Marketing** > **Contacts**.



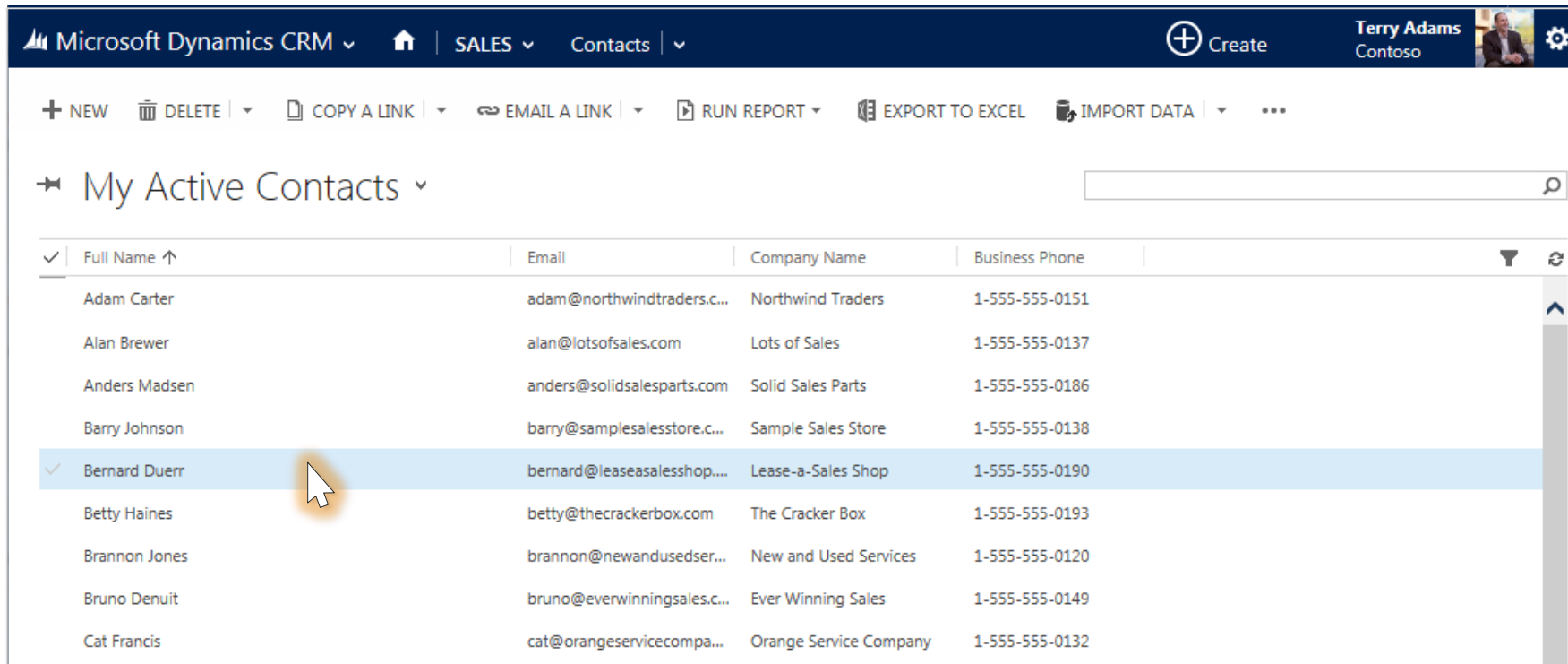
[Take a video tour](#)

If your screen looks like this (older version):
On the nav bar, choose your work area, and then choose the tile for **Contacts**.



view your contacts in a list

When you go to your contacts, you'll see the names in a list. Choose a name to see details or to enter more data.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', and 'Contacts'. A 'Create' button is visible on the right. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main content area is titled 'My Active Contacts' and contains a table of contact information. A mouse cursor is hovering over the row for 'Bernard Duerr'.

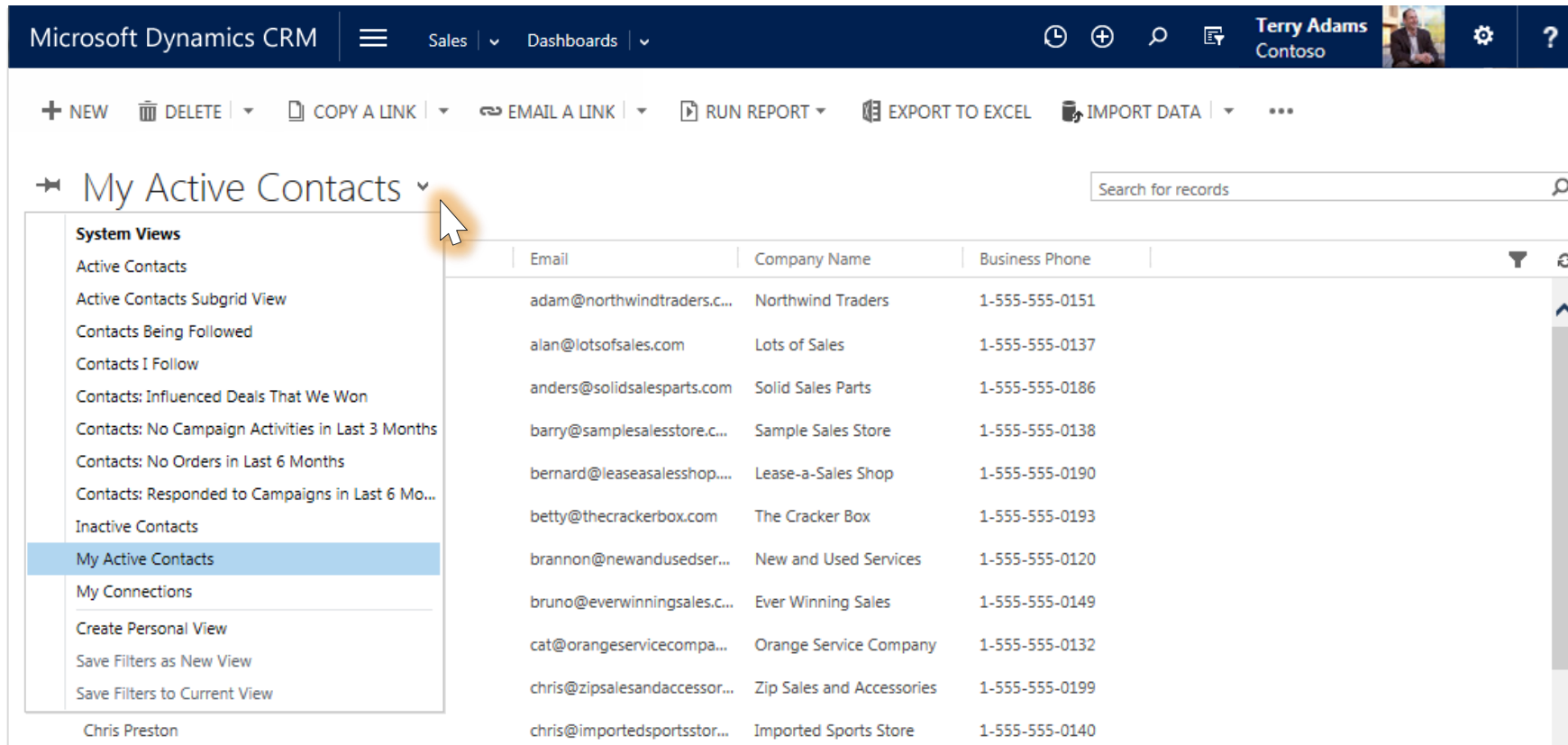
Full Name ↑	Email	Company Name	Business Phone
Adam Carter	adam@northwindtraders.c...	Northwind Traders	1-555-555-0151
Alan Brewer	alan@lotsofsales.com	Lots of Sales	1-555-555-0137
Anders Madsen	anders@solidsalesparts.com	Solid Sales Parts	1-555-555-0186
Barry Johnson	barry@samplesalesstore.c...	Sample Sales Store	1-555-555-0138
✓ Bernard Duerr	bernard@leaseasalesshop....	Lease-a-Sales Shop	1-555-555-0190
Betty Haines	betty@thecrackerbox.com	The Cracker Box	1-555-555-0193
Brannon Jones	brannon@newandusedser...	New and Used Services	1-555-555-0120
Bruno Denuit	bruno@everwinningsales.c...	Ever Winning Sales	1-555-555-0149
Cat Francis	cat@orangeservicecompa...	Orange Service Company	1-555-555-0132

[How do I get here?](#)



filter the list to show the right contacts

When you go to your contacts, you'll see the names in a list. You can filter to see only the contacts you're interested in, such as all active contacts in the system, or only the ones you're following. Choose the down arrow next to **My Active Contacts**, and then point to the list you want (for example, **My Connections**).



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', and 'Dashboards'. The user is identified as 'Terry Adams Contoso'. Below the navigation bar, there are action buttons: '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main content area displays the 'My Active Contacts' view. A dropdown menu is open next to the view name, showing a list of system views. The 'My Active Contacts' view is currently selected. The table below the dropdown shows a list of contacts with columns for Email, Company Name, and Business Phone.

System Views	Email	Company Name	Business Phone
Active Contacts	adam@northwindtraders.c...	Northwind Traders	1-555-555-0151
Active Contacts Subgrid View	alan@lotsosales.com	Lots of Sales	1-555-555-0137
Contacts Being Followed	anders@solidsalesparts.com	Solid Sales Parts	1-555-555-0186
Contacts I Follow	barry@samplesalesstore.c...	Sample Sales Store	1-555-555-0138
Contacts: Influenced Deals That We Won	bernard@leasealesshop....	Lease-a-Sales Shop	1-555-555-0190
Contacts: No Campaign Activities in Last 3 Months	betty@thecrackerbox.com	The Cracker Box	1-555-555-0193
Contacts: No Orders in Last 6 Months	brannon@newandusedser...	New and Used Services	1-555-555-0120
Contacts: Responded to Campaigns in Last 6 Mo...	bruno@everwinningsales.c...	Ever Winning Sales	1-555-555-0149
Inactive Contacts	cat@orangeservicecompa...	Orange Service Company	1-555-555-0132
My Active Contacts	chris@zipsalesandaccessor...	Zip Sales and Accessories	1-555-555-0199
My Connections	chris@importedsportsstor...	Imported Sports Store	1-555-555-0140
Create Personal View			
Save Filters as New View			
Save Filters to Current View			

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see more details about a contact

You'll see everything going on with this customer, including any recent updates and posts, and the status of any service cases. Choose a field to update info for a contact right inline. No flipping to another screen.

Microsoft Dynamics CRM | Sales | Dashboards | Terry Adams Contoso

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN

Contact

Adam Smith

Owner: CRM System

Summary

CONTACT INFORMATION

Full Name: Adam Smith
Job Title: Concrete-Mixing-Truck Driver
Parent Customer: Coho Winery
Email: franzkohl@cohowinery.com
Business Phone: 874-152-2115
Mobile Phone: 425-283-8503
Fax: --
Preferred Method: Any
Address: 4 Anfield Road, Liverpool, L4 0TH, United Kingdom

POSTS ACTIVITIES NOTES

Request for help with Factory Designer
Case: Closed by CRM System for Contact Adam Smith. On Request for help with Factory Designer's wall 8/3/2013 11:10 AM

Problem with Building Designer
Case: Closed by CRM System for Contact Adam Smith.

Company

Coho Winery

Recent Cases

Case Title	Priority	Status	Created
Problem with Building...	High	Resolved	8/3/2013
Request for help with F...	Low	Resolved	8/3/2013
Request for help with P...	Normal	Resolved	8/3/2013
Question about Plotters	High	Active	8/3/2013
Problem with 3D Comp...	Low	Active	8/3/2013

Recent Opportunities

No Opportunity records found.

Choose a **phone number** to call. Or, choose an **email** address to send a message.

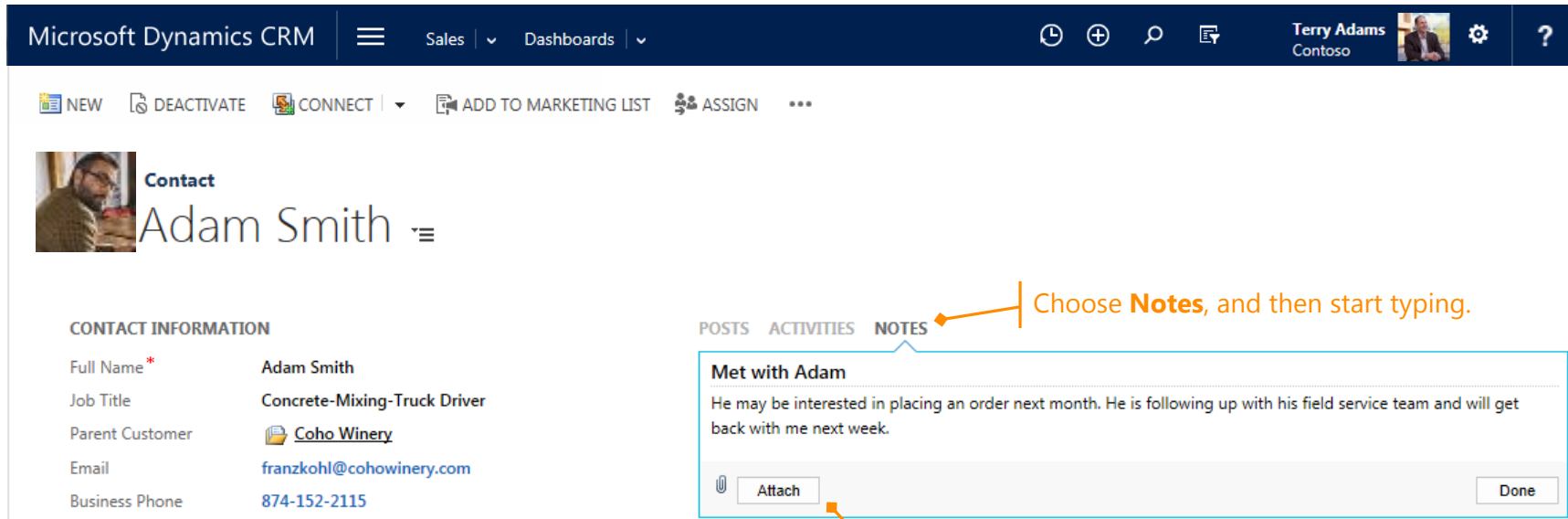
Choose an address to see the **fields you can edit**.

Have a lot going on?
You might need to scroll up and down or left and right to see everything.



add notes about a contact

When you're viewing the details for a contact, choose **Notes**, and then type away.




The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes "Microsoft Dynamics CRM", "Sales", and "Dashboards". The user profile for Terry Adams is visible. Below the navigation bar, there are action buttons: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, and ASSIGN. The main content area displays the contact details for Adam Smith, including a profile picture and a menu icon. On the left, the "CONTACT INFORMATION" section lists: Full Name (Adam Smith), Job Title (Concrete-Mixing-Truck Driver), Parent Customer (Coho Winery), Email (franzkohl@cohowinery.com), and Business Phone (874-152-2115). On the right, the "NOTES" tab is selected, showing a note titled "Met with Adam" with the text: "He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week." Below the note is an "Attach" button and a "Done" button. Two orange callout boxes with arrows point to the "NOTES" tab and the "Attach" button.

Microsoft Dynamics CRM | Sales | Dashboards | Terry Adams Contoso

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN

Contact
Adam Smith


CONTACT INFORMATION

Full Name*	Adam Smith
Job Title	Concrete-Mixing-Truck Driver
Parent Customer	 Coho Winery
Email	franzkohl@cohowinery.com
Business Phone	874-152-2115

POSTS | ACTIVITIES | **NOTES**

Met with Adam

He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week.

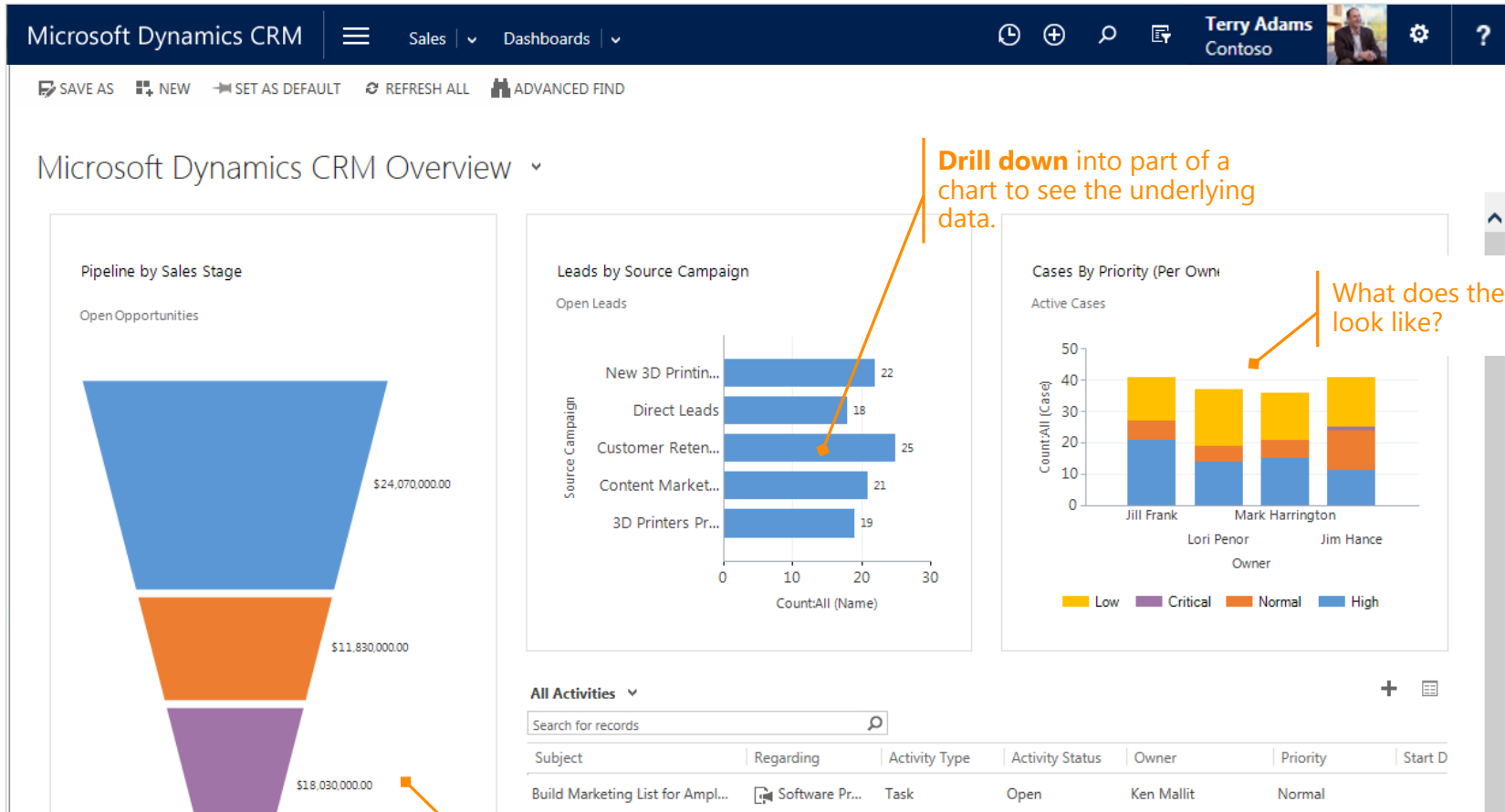
 Attach Done

Attach documents, if you like.



track performance on the dashboard

You'll probably spend a lot of time each day checking the charts and graphs on your dashboard to see how you and your team are doing. You can interact with dashboard data and see the underlying data used to create it by choosing a bar on a chart.



Drill down into part of a chart to see the underlying data.

What does the case load look like?

What's in the sales pipeline?

[How do I get here?](#)



explore dashboard layouts

Want to see your data differently?

Not to worry.

The system comes with several dashboard layouts to help you highlight the data and performance metrics you're most interested in.

The best way to find one you like is to take a look at a few.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM', a menu icon, and 'Sales' and 'Dashboards' dropdowns. Below this is a toolbar with 'SAVE AS', 'NEW', 'REFRESH ALL', and 'ADVANCED FIND'. The main content area is titled 'Microsoft Dynamics CRM Overview' with a dropdown arrow. This dropdown menu is open, showing a list of 'System Dashboards' including 'Customer Service Manager Dashboard', 'Customer Service Performance Dashboard', 'Customer Service Representative SLA Dashboard', 'Demo Data Ager', 'Microsoft Dynamics CRM Overview' (highlighted), 'Microsoft Dynamics CRM Social Overview', 'Opportunities Advanced Heatmap', 'Opportunities HeatMap', 'Sales Activity', 'Sales Analysis', 'Sales Dashboard', 'Sales Management', 'Sales Management Social', 'Sales Performance Dashboard', 'Sales Rep Social', and 'Service Analysis'. To the right of the menu, there's a bar chart titled 'Leads by Source Campaign' showing 'Open Leads' for various campaigns: 'New 3D Printin...' (22), 'Direct Leads' (18), 'Customer Reten...' (25), 'Content Market...' (21), and '3D Printers Pr...' (19). Below the chart is a table titled 'All Activities' with a search bar and columns for 'Subject', 'Regarding', and 'Acti'. The table contains three rows of activity records.

Subject	Regarding	Acti
Build Marketing List for Amplif...	Software Pr...	Task
Prepare Collateral for Amplif...	Software Pr...	Task
Secure catering for Amplify y...	Software Pr...	Task

Choose this arrow to see more dashboard layouts.

[How do I get here?](#)



get back to recently viewed items

Choose the **Recently Viewed Items** button on the nav bar to get back to your recent work. Pin the customer records you use all the time to keep them handy at the top of the list.

The screenshot shows the Microsoft Dynamics CRM interface. The navigation bar at the top includes the text "Microsoft Dynamics CRM", a hamburger menu icon, "Sales" with a dropdown arrow, "Dashboards" with a dropdown arrow, a clock icon (highlighted with a mouse cursor), a plus icon, a search icon, a help icon, and the text "CRM System Contoso".

Below the navigation bar, there are two main sections:

- Recent Views:** A list of views with icons and a pin icon to the right. The items are: "Active Accounts" (brown folder icon), "All Leads" (blue phone icon), "My Active Cases" (purple key icon), "Active Cases" (purple key icon), and "Published Articles" (blue document icon).
- Recent Records:** A list of records with icons and a pin icon to the right. The items are: "Contact information requested" (purple key icon), "Sales Dashboard" (blue dashboard icon), "Microsoft Dynamics CRM Overview" (blue dashboard icon), "Sales Management" (blue dashboard icon), and "Sales Performance Dashboard" (blue dashboard icon).

Annotations with orange arrows point to specific elements:

- An arrow points to the "Recent Views" section with the text "Get back to recent views".
- An arrow points to the pin icon next to "Contact information requested" with the text "Pin the records you use most often.".
- An arrow points to the pin icons next to "Microsoft Dynamics CRM Overview", "Sales Management", and "Sales Performance Dashboard" with the text "Get back to recent dashboards and records".

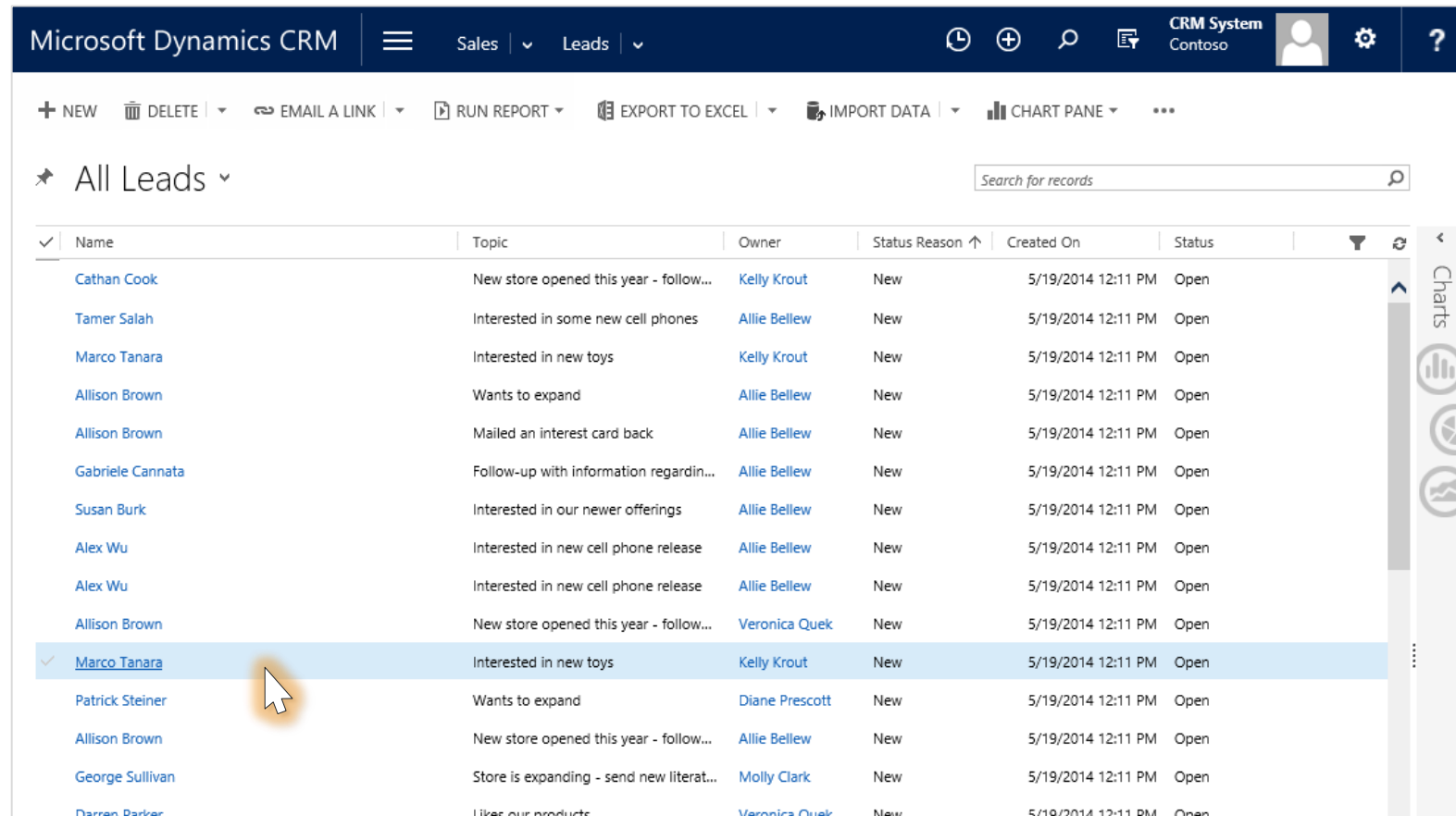


Applies to: Microsoft Dynamics CRM Online 2015 Update 1



find your leads

If you're in sales, you'll keep track of your potential business with **leads**. You can enter leads manually, generate them from marketing campaigns or inquiries from your website, buy them in mailing lists, or create them automatically from posts on Facebook or Twitter.



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', a hamburger menu, 'Sales', and 'Leads'. The right side of the navigation bar shows 'CRM System Contoso', a user profile icon, a settings gear, and a help question mark. Below the navigation bar is a ribbon with options: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and a more options menu. The main content area is titled 'All Leads' and features a search box labeled 'Search for records'. A table of leads is displayed with the following columns: Name, Topic, Owner, Status Reason, Created On, and Status. The 'Marco Tanara' row is highlighted, and a mouse cursor is pointing at it. On the right side, there is a 'Charts' sidebar with three chart icons.

Name	Topic	Owner	Status Reason	Created On	Status
Cathan Cook	New store opened this year - follow...	Kelly Krout	New	5/19/2014 12:11 PM	Open
Tamer Salah	Interested in some new cell phones	Allie Bellew	New	5/19/2014 12:11 PM	Open
Marco Tanara	Interested in new toys	Kelly Krout	New	5/19/2014 12:11 PM	Open
Allison Brown	Wants to expand	Allie Bellew	New	5/19/2014 12:11 PM	Open
Allison Brown	Mailed an interest card back	Allie Bellew	New	5/19/2014 12:11 PM	Open
Gabriele Cannata	Follow-up with information regardin...	Allie Bellew	New	5/19/2014 12:11 PM	Open
Susan Burk	Interested in our newer offerings	Allie Bellew	New	5/19/2014 12:11 PM	Open
Alex Wu	Interested in new cell phone release	Allie Bellew	New	5/19/2014 12:11 PM	Open
Alex Wu	Interested in new cell phone release	Allie Bellew	New	5/19/2014 12:11 PM	Open
Allison Brown	New store opened this year - follow...	Veronica Quek	New	5/19/2014 12:11 PM	Open
✓ Marco Tanara	Interested in new toys	Kelly Krout	New	5/19/2014 12:11 PM	Open
Patrick Steiner	Wants to expand	Diane Prescott	New	5/19/2014 12:11 PM	Open
Allison Brown	New store opened this year - follow...	Allie Bellew	New	5/19/2014 12:11 PM	Open
George Sullivan	Store is expanding - send new literat...	Molly Clark	New	5/19/2014 12:11 PM	Open
Darren Parker	Likes our products	Veronica Quek	New	5/19/2014 12:11 PM	Open

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move leads through the sales process

Everyone on your team moves customers through standardized business processes with the same stages and steps. You complete a step by entering data or marking the step completed in the process bar at the top of the screen. When all the steps are done, you can move on to the next stage.

The screenshot displays the Microsoft Dynamics CRM interface for a lead record. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', 'Leads', and the user 'Marco Tanara'. Below the navigation bar, there are action buttons: '+ NEW', 'DELETE', 'QUALIFY', 'DISQUALIFY', 'ADD TO MARKETING LIST', 'ASSIGN', and 'SHARE'. The lead record is for 'Marco Tanara' and is currently in the 'Qualify (Active)' stage. A process bar at the top shows the stages: 'Qualify (Active)', 'Develop', 'Propose', 'Close', and 'Next Stage'. An orange arrow points to the 'Develop' stage with the text: 'Enter data in the fields on the process bar, and then move on to the next stage.' Below the process bar, there are fields for 'Existing Contact?', 'Existing Account?', 'Purchase Timeframe', 'Estimated Budget', 'Purchase Process', and 'Identify Decision Maker'. The 'Purchase Timeframe' is set to 'This Quarter', 'Estimated Budget' is '\$1,710,500.00', and 'Purchase Process' is 'Individual'. The 'Identify Decision Maker' field has a 'mark complete' link. Below the process bar, there is a 'Summary' section with tabs for 'CONTACT', 'POSTS', 'ACTIVITIES', 'NOTES', and 'ONENOTE'. The 'CONTACT' tab is active, showing fields for 'Topic', 'Name', 'Job Title', 'Business Phone', 'Mobile Phone', and 'Email'. The 'POSTS' tab is also visible, showing a post by 'Marco Tanara' on '3/8/2015 8:40 PM'. The 'STAKEHOLDERS' section shows 'Aaron Nicholls' as a stakeholder.

Microsoft Dynamics CRM | Sales | Leads | Marco Tanara | CRM System Contoso

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD | Marco Tanara

Qualify (Active) | Develop | Propose | Close | Next Stage

Existing Contact? [click to enter](#) | Estimated Budget \$1,710,500.00 | Capture Summary [click to enter](#)
Existing Account? [click to enter](#) | Purchase Process Individual
Purchase Timeframe This Quarter | Identify Decision Maker [mark complete](#)

Summary

CONTACT

Topic* Interested in new toys
Name* Marco Tanara
Job Title Owner
Business Phone 297-555-0192
Mobile Phone --
Email mtanara@tailspintoy.com

POSTS | ACTIVITIES | NOTES | ONENOTE

Enter post here | POST

Both | Auto posts | User posts

Marco Tanara
CRM System created Marco Tanara
On Marco Tanara's wall
3/8/2015 8:40 PM

STAKEHOLDERS +

Name ↑ | f

Aaron Nicholls | Sta



edit data right inline

When you're working on an opportunity, most fields are editable right inline. Choose a field to see what changes you can make.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity. The top navigation bar shows 'Microsoft Dynamics CRM' and 'Sales > Opportunities > Replacing SD exhibi...'. The main header area includes the opportunity name 'Replacing SD exhibits with HDTVs' and key fields: 'Est. Close Date: 11/21/2014', 'Est. Revenue: \$1,846,952.00', 'Status: In Progress', and 'Owner: Veronica Qui...'. Below the header is a progress bar with stages: 'Qualify (Active)', 'Develop', 'Propose', 'Price Execution', 'Close', and 'Next Stage'. The 'Qualify (Active)' stage is expanded to show tasks: 'Identify Contact' (Cat Francis), 'Identify Account' (Coho Winery), 'Purchase Timeframe' (click to enter), 'Estimated Budget' (click to enter), 'Purchase Process' (click to enter), and 'Identify Decision Maker' (mark complete). The 'Summary' section is visible below, showing fields for 'Topic', 'Contact', 'Account', 'Purchase Timeframe', 'Currency', 'Budget Amount', 'Purchase Process', 'Probability' (80), and 'Description'. An orange arrow points to the 'Probability' field. The 'Summary' section also includes a 'POSTS' tab with an activity titled 'Follow up to define customer need' and a 'STAKEHOLDERS' section.

Choose any field to enter or make changes to data.



add decision makers to an opportunity

You can add stakeholders to an opportunity so that you can keep track of all the decision makers for a deal in one place.

Microsoft Dynamics CRM | Sales | Opportunities | Replacing SD exhibi...

OPPORTUNITY

Replacing SD exhibits with HDTVs

Est. Close Date: 11/21/2014 | Est. Revenue: \$1,846,952.00 | Status: In Progress | Owner: Veronica Que...

Qualify (Active) | Develop | Propose | Price Execution | Close | Next Stage

- Identify Contact: Cat Francis
- Identify Account: Coho Winery
- Purchase Timeframe: [click to enter](#)
- Estimated Budget: [click to enter](#)
- Purchase Process: [click to enter](#)
- Identify Decision Maker: [mark complete](#)
- Capture Summary: [click to enter](#)

Summary

Topic*: Replacing SD exhibits with HDTVs

Contact: Cat Francis

Account: Coho Winery

Purchase Timeframe: --

Currency*: US Dollar

Budget Amount: --

Purchase Process: --

Probability: 80

Description: --

POSTS | **ACTIVITIES** | NOTES | ONENOTE

All | Add Phone Call | Add Task | ...

Follow up to define customer need
Reach out to Cat to determine what Coho is looking for
Completed by CRM System 3/9/2015 3:37 AM

First Name*: Cat
Last Name*: Francis
Email: Cat@cohowinery.com
Mobile Phone: --
Company: Coho Winery

STAKEHOLDERS +

Name ↑	Role
--------	------

Choose the **Add** button, and then select a name and role.



where is the save button?

Any time you want to save your data, choose the **Save** button at the bottom corner of the screen.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity record titled "Replacing SD exhibits with HDTVs". The top navigation bar shows "Microsoft Dynamics CRM" and the current record path: "Sales > Opportunities > Replacing SD exhibi...". The ribbon contains several action buttons: "+ NEW", "CLOSE AS WON", "CLOSE AS LOST", "RECALCULATE OPPORTUN...", "ASSIGN", "EMAIL A LINK", and "DELETE". The record details include "Est. Close Date: 11/21/2014", "Est. Revenue: \$1,846,952.00", "Status: In Progress", and "Owner: Veronica Qu...". The progress bar shows the current stage as "Qualify (Active)", with other stages being "Develop", "Propose", "Price Execution", "Close", and "Next Stage". The summary section includes fields for "Topic", "Contact", "Account", "Purchase Timeframe", "Currency", "Budget Amount", "Purchase Process", "Probability", and "Description". A callout box with orange text and a line pointing to the bottom right corner of the screen states: "The Save button is at the bottom of the screen." The "Save" button is highlighted with an orange square.



check in on service cases

Want to check in on any active requests for customer service? Switch to the service work area, and then choose the case you want to view.

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Service' and 'Cases' dropdowns. Below the navigation bar, there are several action buttons: '+ NEW CASE', 'PHONE SUPPORT', 'DELETE', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and a menu icon. The main content area is titled 'Active Cases' and features a search bar. A table lists various cases with columns for Case Title, Case Number, Priority, and Origin. The case 'Issue with Contoso M1650' is highlighted. To the right of the table, a bar chart titled 'Active Cases by Agent' shows the number of cases assigned to five agents: Veronica Quek (16), Allie Balfew (13), Kelly Krout (7), Molly Clark (8), and Diane Prescott (11).

Case Title	Case Number	Priority	Origin
Average order shipment time	CAS-01213-P8B3X0	Normal	Web
Complete overhaul required	CAS-01214-S6Z4Z6	High	Web
Contact information requested	CAS-01215-NOY1T2	Normal	Phone
Contact information required	CAS-01216-L3S7F2	Normal	Phone
Contoso E70 Error	CAS-00097-L2K0K4	Normal	Phone
Customer needs assistance with Contoso M1600	CAS-00055-V8L7L7	Low	Facebook
Customer needs assistance with Large MP5 Players M1650	CAS-00110-P8Q4W5	High	Phone
Customer needs assistance with Plotters	CAS-00114-Y8T3S0	Normal	Twitter
Damaged during shipment	CAS-01217-H7H0B3	Low	Email
Defective item delivered	CAS-01218-G6H0J9	Low	Phone
Faulty product catalog	CAS-01220-S1K8F4	Normal	Email
Incorrect product information	CAS-01221-T1W4S9	Normal	Phone
Incorrect product information online	CAS-01222-S6G5J0	High	Email
Information on the product	CAS-01223-Z6Y4Y1	Low	Email
Issue with Contoso M1650	CAS-00141-W9K9Z4	Low	Web
Issue with Data Link	CAS-00136-M6J5Q2	High	Web
Issues with Contoso E900	CAS-00058-T3S6M8	Normal	Phone
Item defective	CAS-01224-K7W7X1	Normal	Email
Item defective on delivery	CAS-01225-S6T6T3	High	Phone

Agent	Count
Veronica Quek	16
Allie Balfew	13
Kelly Krout	7
Molly Clark	8
Diane Prescott	11

[How do I get here?](#)

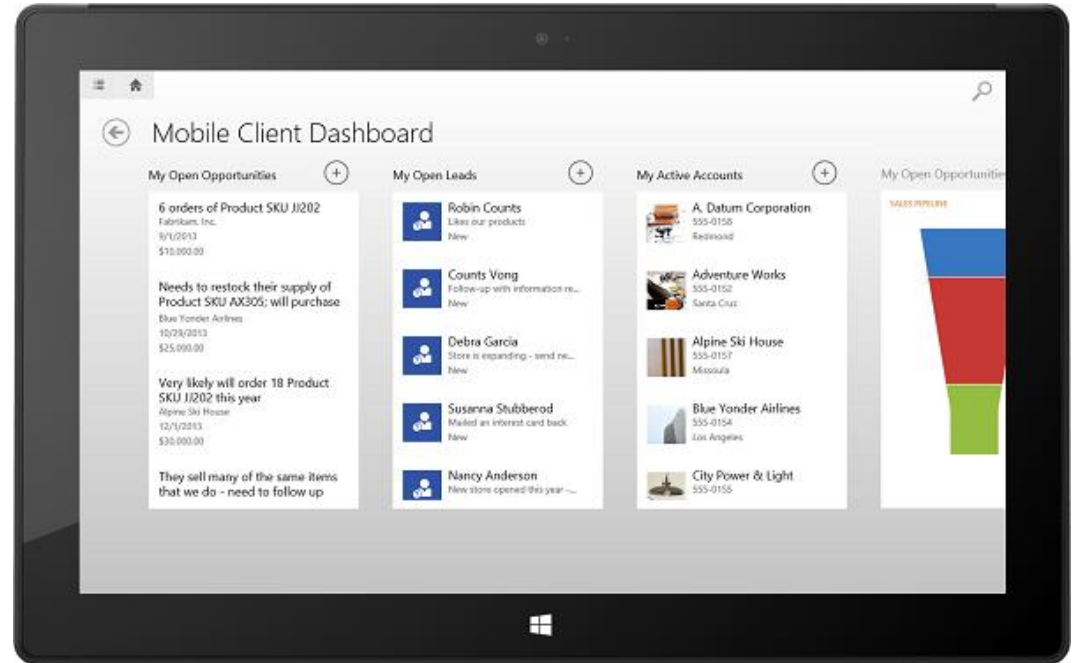


take your CRM work with you on mobile

Microsoft Dynamics CRM is not just for using in a web browser on a computer—you can also use it on your phone, on your Surface, or on your iPad.

Download the app from the online store for your phone or tablet (search for “Dynamics crm”).

Note: You may need to check with the person who manages your system day-to-day, to make sure you have the security permissions required to use the app.



CRM Help & Training

The [CRM Help & Training website](http://www.CRMHelpandTraining.com) has lots of great Help content including:

- videos
- eBooks
- walkthroughs
- customizable training
- ...and more!

Find Help for your role.

The screenshot shows the Microsoft Dynamics CRM Help & Training website. At the top, there is a search bar labeled "Search Help & Communities". Below the search bar, there are three main sections: "What's New" with a "See the latest!" link and a right arrow, "Get Started" with a link to "Guides, eBooks, videos, and more", and "Get ready for the next release". A navigation bar below these sections contains icons and labels for "Sales", "Service", "Marketing", and "Admins". The "Sales" icon is highlighted with an orange arrow pointing to the text "Find Help for your role.". Below the navigation bar, there is a "Featured" section with a list of links: "How do I...", "Mobile apps", "Business processes", "Data management", "CRM for Outlook", and "Reports". To the right of this list, there are links to "CRM Basics Guide", "Outlook User's Guide", "Videos & eBooks", "Training Kit", and "All topics...". At the bottom of the page, there are three icons: "Videos" (a video camera), "Community" (three people), and "Support" (a wrench).



www.CRMHelpandTraining.com



Thanks for reading!

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